| DEPARTMENT OF HEALTH AND HUMAN SERVICES HEALTH CARE FINANCING ADMINISTRATION  |  | FORM APPROVED<br>OMB NO. 0938-019             |
|---|--|---|
| TRANSMITTAL AND NOTICE OF APPROVAL OF STATE PLAN MATERIAL FOR: HEALTH CARE FINANCING ADMINISTRATION   | 1. TRANSMITTAL NUMBER:   | 2. STATE:  MN  ITLE XIX OF THE SOCIAL         |
| TO: REGIONAL ADMINISTRATOR HEALTH CARE FINANCING ADMINISTRATION DEPARTMENT OF HEALTH AND HUMAN SERVICES  TYPE OF PLAN MATERIAL (Check One):  NEW STATE PLAN  COMPLETE BLOCKS 6 THRU 10 IF THIS IS AN AME  COMPLETE BLOCKS 6 THRU 10 IF THIS IS AN AME  FEDERAL STATUTE/REGULATION CITATION:  Sections 1902(a)(10)(A)(ii)(X), 1902(a)(10)(C) 1902(r)(2), 1905(a)  PAGE NUMBER OF THE PLAN SECTION OR ATTACHMENT: Pp. 13a,22,25a of Attach. 2.2-A; p.1 of Supp.  Attach. 2.2-A; p.5, Supp. 1 to Attach. 2.6-A;  6, 7 to Supp. 2 of Attach. 2.6-A; p. 1, Supp.  Attach. 2.6-A; p. 4, Supp. 8a of Attach. 2.6-A;  2, Supp. 8b to Attach. 2.6-A  | 4. PROPOSED EFFECTIVE DATE  July 1, 2001  DNSIDERED AS NEW PLAN  ENDMENT (Separate Transmittal for each at a separate to the s | 1,315,000<br>7,892,000<br>RSEDED PLAN SECTION |
|   |  |   |
| Revisions to income and resource standards and including certain disabled children.   | d methodologies for elderly,  ☐ OTHER, AS SPECIFIED:   | blind and disabled                            |
| including certain disabled children.  11. GOVERNOR'S REVIEW (Check One):  XX GOVERNOR'S OFFICE REPORTED NO COMMENT  COMMENTS OF GOVERNOR'S OFFICE ENCLOSED  NO REPLY RECEIVED WITHIN 45 DAYS OF SUBMITTAL   | OTHER, AS SPECIFIED:   | blind and disabled                            |
| Revisions to income and resource standards and including certain disabled children.  11. GOVERNOR'S REVIEW (Check One):  XX GOVERNOR'S OFFICE REPORTED NO COMMENT  COMMENTS OF GOVERNOR'S OFFICE ENCLOSED  NO REPLY RECEIVED WITHIN 45 DAYS OF SUBMITTAL  12. SIGNATURE OF STATE AGENCY OFFICIAL:  Mary B. Kennedy  14. TITLE:  Medicaid Director  15. DATE SUBMITTED:  |  |   |
| Revisions to income and resource standards and including certain disabled children.  11. GOVERNOR'S REVIEW (Check One):  XX GOVERNOR'S OFFICE REPORTED NO COMMENT  COMMENTS OF GOVERNOR'S OFFICE ENCLOSED  NO REPLY RECEIVED WITHIN 45 DAYS OF SUBMITTAL  12. SIGNATURE OF STATE AGENCY OFFICIAL:  Mary B. Kennedy  14. TITLE:  Medicaid Director  15. DATE SUBMITTED:  September 10, 2001  | OTHER, AS SPECIFIED:  16. RETURN TO:  Stephanie Schwartz Minnesota Department of H 444 Lafayette Road St. Paul, MN 55155-3853  |   |
| Revisions to income and resource standards and including certain disabled children.  11. GOVERNOR'S REVIEW (Check One):    XX GOVERNOR'S OFFICE REPORTED NO COMMENT   COMMENTS OF GOVERNOR'S OFFICE ENCLOSED   NO REPLY RECEIVED WITHIN 45 DAYS OF SUBMITTAL  2. SIGNATURE OF STATE AGENCY OFFICIAL:   Mary B. Kennedy   Mary | OTHER, AS SPECIFIED:  16. RETURN TO:  Stephanie Schwartz Minnesota Department of H 444 Lafayette Road St. Paul, MN 55155-3853  FFICE USE ONLY  18. DATE APPROVED:  |   |
| Revisions to income and resource standards and including certain disabled children.  11. GOVERNOR'S REVIEW (Check One):  XX GOVERNOR'S OFFICE REPORTED NO COMMENT  COMMENTS OF GOVERNOR'S OFFICE ENCLOSED  NO REPLY RECEIVED WITHIN 45 DAYS OF SUBMITTAL  12. SIGNATURE OF STATE AGENCY OFFICIAL:  Mary B. Kennedy  14. TITLE:  Medicaid Director  15. DATE SUBMITTED:  September 10, 2001  FOR REGIONAL OFFICIAL:  9-14-01  PLAN APPROVED  | OTHER, AS SPECIFIED:  16. RETURN TO:  Stephanie Schwartz Minnesota Department of H 444 Lafayette Road St. Paul, MN 55155-3853  FFICE USE ONLY  18. DATE APPROVED: ONE COPY ATTACHED  | uman Services                                 |
| Revisions to income and resource standards and including certain disabled children.  11. GOVERNOR'S REVIEW (Check One):  XX GOVERNOR'S OFFICE REPORTED NO COMMENT  COMMENTS OF GOVERNOR'S OFFICE ENCLOSED  NO REPLY RECEIVED WITHIN 45 DAYS OF SUBMITTAL  12. SIGNATURE OF STATE AGENCY OFFICIAL:  Mary B. Kennedy  14. TITLE:  Medicaid Director  15. DATE SUBMITTED:  September 10, 2001  FOR REGIONAL OFFICIAL:  9-14-01  PLAN APPROVED -  | OTHER, AS SPECIFIED:  16. RETURN TO:  Stephanie Schwartz Minnesota Department of H 444 Lafayette Road St. Paul, MN 55155-3853  FFICE USE ONLY  18. DATE APPROVED:  | uman Services                                 |
| Revisions to income and resource standards and including certain disabled children.  11. GOVERNOR'S REVIEW (Check One):    XX GOVERNOR'S OFFICE REPORTED NO COMMENT   COMMENTS OF GOVERNOR'S OFFICE ENCLOSED   NO REPLY RECEIVED WITHIN 45 DAYS OF SUBMITTAL    12. SIGNATURE OF STATE AGENCY OFFICIAL:    Mary B. Kennedy   Mary B. Kennedy    14. TITLE:   Medicaid Director    15. DATE SUBMITTED:   September 10, 2001      FOR REGIONAL OF THE OF APPROVED MATERIAL:   | OTHER, AS SPECIFIED:  16. RETURN TO:  Stephanie Schwartz Minnesota Department of H 444 Lafayette Road St. Paul, MN 55155-3853  FFICE USE ONLY  18. DATE APPROVED:  ONE COPY ATTACHED  20. SIGNATURE OF REGIONAL OFFICE   | uman Services  IAL:                           |

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### MINNESOTA MEDICAL ASSISTANCE

Fiscal Analysis of State Plan Amendment **TN 01-10** to Increase Income for Elderly & Disabled, including Disabled Children, and Raise Income Disregards for Medically Needy Aged, Blind and Disabled Effective July 1, 2001

This change increases the income standard for the elderly and disabled to 95% of FPG, effective July 1, 2001 along with an income disregard. Also changed is the level of income retained by the medically needy aged, blind and disabled; with income disregards, this level increases to 70% of poverty on July , 2001 and to 75% of poverty on July, 1, 2002. It will eliminate the monthly spenddown for some cases and reduce it for others. It will also increase the cost for the QMB-only cases and extend eligibility to some new cases. Two (2) months of payments are assumed in FFY 2001 for the current July - September quarter.

A summary of these estimates and their funding is as follows:

|                          | _        | Y 2001               | FF       | <u>Y 2002</u> |
|--------------------------|----------|----------------------|----------|---------------|
| Spenddown Eliminated:    | (D       | ollars in Thousands) |          |               |
| Elderly Cases            |          | 2,097                |          | 2,097         |
| Disabled Cases           |          | 2,730                |          | 2,730         |
| Elderly Cost             | \$       | 451                  | \$       | 2,708         |
| Disabled Cost            | \$       | 598                  | \$       | 3,590         |
| Spenddown Reduced:       |          |                      |          |               |
| Elderly Cases            |          | 1,553                |          | 1,553         |
| Disabled Cases           | •        | 1,953                | •        | 1,953         |
| Elderly Cost             | \$<br>\$ | (3)                  | \$<br>\$ |               |
| Disabled Cost            | Ф        | (4)                  | Ф        | (23)          |
| QMB-only Cases Affected: |          |                      |          |               |
| Elderly Cases            |          | 2,714                |          | 2,714         |
| Disabled Cases           | •        | 1,077                | •        | 1,077         |
| Elderly Cost             | \$<br>\$ | 767                  | \$<br>\$ | 4,602         |
| Disabled Cost            | Þ        | 372                  | Ф        | 2,233         |
| New Enrollees:           |          |                      |          |               |
| Elderly Cases            |          | 593                  |          | 593           |
| Disabled Cases           | •        | 343                  | •        | 343           |
| Elderly Cost             | \$       | 196                  | \$<br>\$ |               |
| Disabled Cost            | \$       | 113                  | Þ        | 677           |
| Totals:                  |          |                      |          |               |
| Elderly Cases            |          | 6,957                |          | 6,957         |
| Disabled Cases           |          | 6,103                |          | 6,103         |
| Elderly Cost             | \$       | 1,411                | \$       | 8,465         |
| Disabled Cost            | \$       | 1,079                | \$       | 6,477         |
|                          |          |                      |          |               |
| Total MA cost            | \$       | 2,490                | \$       | 14,942        |
| State Share              |          | 1,217                | \$       | 7,305         |
| Federal Share (.5111%)   |          | 1,273                | \$       | 7,637         |
| ,                        |          |                      |          |               |

#### MINNESOTA MEDICAL ASSISTANCE

#### Fiscal Analysis of State Plan Amendment TN 01-10 to

Raise Income Disregards for Certain Disabled Children

Effective July 1, 2001

This change excludes child support payments, social security payments and other basic needs benefits as income to disabled children who qualify as optional categorically needy or medically needy under certain categories in which Medicaid is determined without regard to parental income. The effect of this change would be to eliminate most spenddowns for the medically needy children. (The income standard of 100% of the Federal poverty level for these children has been included in the budget for the income increase for all disabled.) The net cost for this exclusion is then estimated at 75% of the spenddown amount after the income standards change.

A summary of these estimates and the funding is as follows:

|  |          | Y 2001<br>ollars in T | Γhousands) | <u>F</u> F | Y 2002 |
|--|----------|-----------------------|------------|------------|--------|
| Before 100% FPG change:                  |          |                       |            |            |        |
| Certain disabled children with spenddown |          | 70                    |            |            | 70     |
| Average monthly spendown                 | \$       | 333                   |            | \$         | 333    |
| Number of months in FFY affected         |          | 2                     |            |            | 12     |
| Annual value of spenddown                | \$       | 47                    |            | \$         | 280    |
|  | -        |                       |            |            |        |
| After 100% FPG change:                   |          |                       |            |            |        |
| Certain disabled children with spenddown |          | 12                    |            |            | 12     |
| Average monthly spendown                 | \$       | 626                   |            | \$         | 626    |
| Number of months in FFY affected         |          | 2                     |            |            | 12     |
| Annual value of spenddown                | \$       | 15                    |            | \$         | 90     |
|  | -        |                       |            |            |        |
| Total Cost:<br>FFY 2001 (15 x 75%)       | \$       | 11                    |            | \$         | 68     |
| FFY 2002 (90 x 75%)                      |          |                       |            | Ф          | 00     |
| Total MA cost                            | \$       | 11                    |            | \$         | 68     |
| State Share                              | \$       | 5                     |            | \$         | 33     |
| Federal Share (.5111%)                   | \$       | 6                     |            | \$         | 35     |
| DHS Reports & Forecasts Div.             | Septembe | r 6, 2001             |            |            |        |

### MINNESOTA MEDICAL ASSISTANCE

### Fiscal Analysis of State Plan Amendment TN 01-10 to

Allow the MA-EPD Asset Standards to be Used for One Year For Former MA-EPD Eligibles who Remain on Medicaid Effective July 1, 2001

The asset change would allow MA eligibility to be based on the the MA-EPD standards for up to one year after they are no longer employed. The average monthly persons projected to be affected by this change is 60. A summary of the estimate and their funding is as follows:

|  | F <u>FY 2001</u><br>(Dollars in Thousands) | FFY 2002                   |
|--|--|----------------------------|
| 12-Month Asset Exception:  |  |                            |
| Average monthly exception eligibles  | 60   | 60                         |
| Number of months eligible  | 2  | 12                         |
| Average monthly cost   | \$ 597.00                                  | \$ 597.00                  |
| Total Annual Cost:<br>FFY 2001 (60 x 2 x \$597)<br>FFY 2002 (60 x 12 x \$597)  | \$ 72                                      | \$ 430                     |
| Total MA cost for asset change:  FFY 2001  FFY 2002  State Share  Federal Share (.5111%)   | \$ 72<br>\$ 36<br>\$ 36                    | \$ 430<br>\$ 210<br>\$ 220 |
|  | F <u>FY 2001</u><br>(Dollars in Thousands) | FFY 2002                   |
| Total MA Cost for TN 01-10 from income increase for ABD, disregard increase for certain disabled children, and asset increase for former MA-EPD: | \$ 2,573                                   | \$ 15,440                  |
| Total State Share  | \$ 1,258                                   | \$ 7,548                   |
| Total Federal Share  | \$ 1,315                                   | \$ 7,892                   |

| Revision: | HCFA-PM-91-4 (BPD)<br>August 1991              | ATTACHMENT 2.2-A<br>Page 13a<br>OMB No.: 0938-  |
|-----------|--|---|
|           | State: MINNESOTA                               |   |
| Citation  | Groups Cove                                    | red   |
|           | B. Optional Groups Other Than th               | e Medically Needy (Continued)   |
|           | psychiatric facilities of                      | ring active treatment as inpatients in or programs (who are under the age of ychiatric services for individuals under age or this plan. |
|           | X (6) Other defined gro<br>of Attachment 2.2-A | ups and ages as specified in Supplement 1   |
|           |  |   |

Revision: HCFA-PM- 91-4 (BPD) August 1991

ATTACHMENT 2.2-A Page 22 OMB NO.: 0938-

| State:  | MINN     | NESOT.       | Α   |
|---|----------|--------------|---|
| Agency* Citation(s)                             |          | G            | roups Covered   |
|   | В.       | <u>Optio</u> | nal Groups Other Than the Medically Needy (Continued)   |
| 1902(a)(10)(A)                                  | <u>X</u> | 16.          | Individuals -   |
| (ii)(X) and<br>1902(m)(1) and (3)<br>of the Act |          | a.           | Who are 65 years of age or older or who are disabled, As determined under section 1614(a)(3) of the Act. Both Aged and disabled individuals are covered under this eligibility group.               |
|   |          | b.           | Whose income does not exceed the income level specified in <u>Supplement 1 to ATTACHMENT 2.6-A (95 percent)</u> as a percent of the Federal income poverty level for a family of the same size; and |
|   |          | c.           | Whose resources do not exceed the maximum amount allowed under the State's medically needy category for aged, blind and disabled.   |

| TN No. 01-10 |               |                       |
|--------------|---------------|-----------------------|
| Supersedes   | Approval Date | Effective Date 7/1/01 |
| TN No. 91-26 |               | HCFA ID: 7983E        |

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|---|-----|----|----|---|
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|   |     |    |    |   |

HCFA-PM-91-4 (BPD)

**ATTACHMENT 2.2-A** 

| Augus                      | st 1991                             | Page 25a<br>OMB No.: 0938-  |
|----------------------------|-------------------------------------|---|
| State:                     | MINNESOTA                           |   |
| Citation                   | Groups (                            | Covered   |
|                            | C. Optional Coverage of the M       | edically Needy (Continued)  |
|                            |                                     | adoptions subsidized in full or part by a public under the age of).   |
|                            |                                     | NFs (who are under the age of). NF ider under this plan.  |
|                            |                                     | the group under (b)(3), individuals in are under the age of).   |
|                            | psychiatric facili                  | ceiving active treatment as inpatients in ties or programs (who are under the age of). tric services for individuals under age 21 are his plan. |
|                            | X (6) Other defined of Attachment 2 | groups and ages as specified in <b>Supplement 1</b> .2-A.   |
|                            |                                     |   |
|                            |                                     |   |
|                            |                                     |   |
|                            |                                     |   |
|                            |                                     |   |
|                            |                                     |   |
| TN No. 01-10<br>Supersedes | Approval Date                       | Effective Date 7/01/01  |

TN No. 91-20-91-24

Revision: HCFA-PM-92-4 (BPD)

August 1991

SUPPLEMENT 1 TO ATTACHMENT 2.2-A

Page 1

OMB No.: 0938 -

#### STATE PLAN UNDER TITLE XIX OF THE SOCIAL SECURITY ACT

| otate | State: | Minnesota |  |  |  |
|-------|--------|-----------|--|--|--|
|-------|--------|-----------|--|--|--|

### Reasonable Classifications of Individuals Under the Age of 21, 20, 19 and 18

**B.7(b)(6):** Optional Groups Other Than the Medically Needy

Optional Disabled Children under age 18.

1902(a)(10)(A) (ii)(X), 1902(e)(3) 1905(a)(i) of the Act

Children under age 18, who would be eligible for Medicaid under the plan if they were in a medical institution, who meet the criteria under section 1902(e)(3) and for whom the state has made a determination as required under section 1902(e)(3)(B), who have an income level at or below the level in §1902(m) specified in Supplement 1, page 5 to Attachment 2.6-A using the state's more restrictive income requirements for Medicaid than SSI specified in Supplement 4 to Attachment 2.6-A, and the less restrictive methods specified in Supplement 8a to Attachment 2.6-A.

Optional Children under Age 21 Who Would be Institutionalized but for Home and Community-based Services.

1902(a)(10(A) (ii)(VI) and (X) and 1905(a)(i)

Children who would be eligible for Medicaid under the plan if they were in a medical institution and who, but for the receipt of home and community-based services under a waiver granted under 42 CFR Part 441 would require care in a medical institution, and who will receive services under the waiver; who have an income level at or below the level of §1902(m) specified in Supplement 1, page 5 to Attachment 2.6-A, using the state's more restrictive income requirements for Medicaid than SSI specified in Supplement 4 to Attachment 2.6-A, and the less restrictive income methods specified in Supplement 8a to Attachment 2.6-A.

C.6(b)(6): Optional Coverage of Medically Needy

Medically Needy Disabled Children under Age 18

1902(a)(10)(C) 1905(a)(i) and

Children who are under age 18, who would be eligible for Medicaid under the plan if they were in a medical institution, who meet the criteria under section 1902(e)(3) and for whom the state has made a determination as required under section 1902(e)(3)(B), who have an income level at or below the medically needy level applicable to the disabled in Supplement 1, page 6 to Attachment 2.6-A, using the state's more restrictive income requirements for Medicaid than SSI specified in Supplement 4 to Attachment 2.6-A, and the less restrictive methods specified in Supplement 8a to Attachment 2.6-A.

Medically Needy Children under Age 21 Who Would be Institutionalized bur for Home and Community-based Services

1902(a)(10(C) 1905(a)(i)

Children who would be eligible for Medicaid under the plan if they were in a medical institution and who, but for the receipt of home and community-based under a waiver granted under 42 CFR Part 441, would require care in a medical institution, and who will receive services under the waiver; and who have an income level at or below the medically needy level applicable to the disabled in Supplement 1, page 6 to Attachment 2.6-A, using the state's more restrictive income requirements for Medicaid than SSI specified in Supplement 4 to Attachment 2.6-A, and the less restrictive income methods specified in Supplement 8a to Attachment 2.6-A

| TN No. 01-10 |               |                |         |
|--------------|---------------|----------------|---------|
| Supersedes   | Approval Date | Effective Date | 7/01/01 |
| TN No. 91-26 |               |                |         |

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|---|-----|----|----|---|
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HCFA-PM-92-1 February 1992

SUPPLEMENT 1 TO ATTACHMENT 2.6-A Page 5

| STATE P                                    | LAN UNDER TITLE XIX OF THE SOCIAL SECURITY ACT  |
|--|---|
| State:                                     | Minnesota   |
| Income Eligibility L                       | evels (Continued)   |
|  | 3. Aged and Disabled Individuals:   |
|  | $\overline{(X)}$ The levels for determining income eligibility for groups of aged and disabled individuals under the provisions of section 1902(m)(4) of the Act are as follows:  |
|  | Based on 95 percent of the official Federal income poverty line.  |
|  | Family Size Income Level    1   |
|  | publication of the revised annual Federal poverty level.  For individuals with title II income, the revised poverty levels are not effective until the first day of the month following the end of the transition period.   |
|  | For individuals not receiving title II income, the revised poverty levels are effective no later than the beginning of the month following the date of publication.   |
| 42 CFR 435.236<br>42 CFR 435.1005          | <ol> <li>Institutionalized Individuals Under a Special Income Standard:</li> <li>The level of income is equal to 300 percent of the SSI benefit amount payable under section 1611(b)1) of the Act to an individual in his own home who has no income or resources.</li> </ol> |
| TN No. 01-10<br>Supersedes<br>TN No. 99-02 | Approval Date Effective Date_7/1/01_  |

August 1991

Revision: HCFA-PM-91-4 (BPD) SUPPLEMENT 2 TO ATTACHMENT 2.6-A Page 5

OMB No.: 0938-

# STATE PLAN UNDER TITLE XIX OF THE SOCIAL SECURITY ACT

| IAILI | LAIVU       | NDER TITLE AIX OF THE BOOKE BEGORD THE  |
|-------|-------------|---|
|       | State:      | MINNESOTA   |
| b.    | Option      | nal Group of Children   |
|       | <u></u>     | Same as resource levels in the State's approved AFDC plan.  |
|       | <u>/X</u> / | Less restrictive than the AFDC levels and are as follows:   |
|       |             | No resource test is applied to the following optional groups of children listed in <u>Attachment 2.2-A</u> :                  |
|       |             | B.7.a. Children under age 21 how meet AFDC requirements;  |
|       |             | B.7.b. Other reasonable classifications of optional groups of children described in <u>Supplement 1 to Attachment 2.2-A</u> ; |
|       |             | B.8. Children under age 21 who are under an adoption assistance agreement;  |
|       |             | B.19. Optional Targeted Low-income Children   |

TN No. 01-10 Supersedes TN No. <u>98-16</u>

Approval Date \_\_\_\_\_

Effective Date \_7/1/01 HCFA ID:7985EII

Revision: HCFA-PM-91- 4 August 1991 (BPD)

## SUPPLEMENT 2 TO ATTACHMENT 2.6-A

Page 6 OMB No.: 0938-

# STATE PLAN UNDER TITLE XIX OF THE SOCIAL SECURITY ACT

|    | State:                           | MINNESOTA  |  |
|----|----------------------------------|--|--|
| 4. |                                  | ed Individuals SSI resources levels rictive than SSI resource levels and are as follows: |  |
|    | <u>Family S</u>                  | <u>Resource Level</u> No resource test applied.  |  |
|    | _ <u>2</u><br>_ <u>X</u> Same as | medically needy resource levels  |  |

Revision: HCFA-PM-91-4 (BPD) August 1991

### SUPPLEMENT 2 TO ATTACHMENT 2.6-A

Page 7

OMB No.: 0938-

### STATE PLAN UNDER TITLE XIX OF THE SOCIAL SECURITY ACT

| State: | MINNESOTA                   |  |
|--------|-----------------------------|--|
|        |                             |  |
|        | RESOURCE LEVELS (continued) |  |

### B. <u>MEDICALLY NEEDY</u>

| Applicable to all groups - | <u>/X</u> / | Except those specified below. |
|----------------------------|-------------|-------------------------------|
| Family Size                |             | Resource Level                |
| _1_                        |             | \$3750                        |
| _2_                        |             | 6450                          |
| 3                          |             | 6650                          |
| _4_                        |             | 6950                          |
| _5_                        |             | 7100                          |
| 6                          |             | 7300                          |
| <u>7</u>                   |             | 7500                          |
| 8                          |             |                               |
| 9                          |             | 7900                          |
| 10                         |             | 8150                          |
| For each additional person |             | 200                           |

No resource test is applied to medically needy groups of children listed in Attachment 2.2-A:

C.3. Children under 18 who but for income and resources would be mandatory categorically eligible.

C.5.a. Children under age 21 not described in C.3

 $\underline{\text{C.5.b. Other reasonable classifications of medically needy children described in Supplement 1 to} \\ \underline{\text{Attachment 2.2-A.}}$ 

|              |               |                        | _ |
|--------------|---------------|------------------------|---|
| TN No. 01-10 |               |                        |   |
| Supersedes   | Approval Date | Effective Date _7/1/01 |   |
| TN No. 93-32 |               | HCFA ID:7985E          |   |

Revision: HCFA-PM-91-4 (BPD)

August 1991

**SUPPLEMENT 4 TO ATTACHMENT 2.6-A** 

Page 1

OMB No.: 0938-

|          |           |            |               |          | _            |
|----------|-----------|------------|---------------|----------|--------------|
| CTATE DI |           | TITI E VIV | OF THE SOCIAL | CECIDITY | $\lambda CT$ |
| ALAIR PL | AN UNITER | 1111E AIA  | OF IEE SULIAL |          | A            |

State: MINNESOTA

# METHODS FOR TREATMENT OF INCOME THAT DIFFER FROM THOSE OF THE SSI PROGRAM

(Section 1902(f) more restrictive methods and criteria and State supplement criteria in SSI criteria States without section 1634 agreements and in section 1902(f) States. Use to reflect more liberal methods only if you limit to State supplement recipients. DO NOT USE this supplement to reflect more liberal policies that you elect under the authority of section 1902(r)(2) of the Act. Use Supplement 8a for section 1902(r)(2) methods.)

- The categorically and medically needy income standards for aged, blind, and disabled are lower than the SSI income standards.
- Unusual medical expense payments by the Veterans Administration are considered income to categorically needy and medically needy aged, blind and disabled.
- The standard income disregard of \$20 is not applied.

| TN No. <u>01-10</u> |               |                        |
|---------------------|---------------|------------------------|
| Supersedes          | Approval Date | Effective Date 7/01/01 |
| TN No. 97-32        |               | HCFA ID:7985EII        |

Revision:

HCFA-PM-91-4 (BPD) AUGUST 1991

# SUPPLEMENT 8a TO ATTACHMENT 2.6-A Page 4

| POLICY   | HOW POLICY IS MORE<br>LIBERAL | GROUPS TO WHICH POLICY IS APPLIED  |
|--|-------------------------------|--|
| Add'l ABD Income Disregard. Effective July 1, 2001 through June 30, 2002, disregard the difference between the individual's income in excess of the income standard in Supplement 1 to Attachment 2.6-A, page, and 70 percent of the Federal poverty levels by family size based on Federal poverty levels in effect on July 1, 2001.  Effective July 1, 2002, disregard the difference between the individual's income in excess of the income standard in Supplement 1 to Attachment 2.6-A, page, and 75 percent of the Federal poverty levels by family size, based upon revised Federal poverty levels for calendar year 2002. Thereafter adjust the disregard on each July 1 based on revised Federal poverty levels published for the calendar year. | SSI has no similar disregard. | Mandatory categorically needy aged, blind and disabled under \$1902(f) and m.edically needy aged, blind and disabled under \$1902(a)(10)(C).  Medically needy disabled children under 18. §§ 1902(e), 1905(a)(i) and 1902(a)(10)(C).  Medically needy disabled children under age 21 who would be institutionalized but for HCB services under a §1915(c) waiver; §§1905(a)(i), 1915(c), 1902 (a)(10(C).   |
| COLA delay disregard. Disregard the annual RSDI cost of living adjustment from January 1 through June 30th of each year.   | SSI has no similar disregard. | Mandatory categorically needy aged, blind and disabled under §1902(f) and medically needy aged, blind and disabled under §1902(a)(10)(C).  Medically needy disabled children under 18. §§ 1902(e), 1905(a)(i) and 1902(a)(10)(C).  Medically needy disabled children under age 21 who would be institutionalized but for HCB services under a §1915(c) waiver; §§1905(a)(i), 1915(c), 1902 (a)(10(C).  |
| Disregard for Elderly and Disabled Under §1902(m).  Effective July 1 through June 30 of the following year, disregard the difference between the income standard and 100 percent of the Federal poverty levels, using 100 percent of Federal poverty levels in effect on July 1 of each 12 month period.  The income standard will be adjusted in the first month after the publication of the revised Federal poverty levels for the calendar year. The disregard will be adjusted on the basis of revised Federal poverty levels for the calendar year on each July 1.   | SSI has no similar disregard. | Elderly and disabled who meet more restrictive criteria under §1902(f) and an income level under §§1902(a)(10)(A)(ii)(X) and 1902(m).  Optional categorically needy disabled children under 18. §§ 1902(a)(10)(A)(ii)(X), 1902(e), 1905(a)(i).  Medically needy disabled children under 18. §§ 1902(e), 1905(a)(i) and 1902(a)(10)(C).  Optional categorically needy children under age 21 who would be institutionalized but for HCB services; §§. 1902(a)(10)(A)(ii)(X), 1905(a)(i) and 1915(c)  Medically needy disabled children under age 21 who would be institutionalized but for HCB services; §§1905(a)(i), 1915(c), 1902 (a)(10(C) |
| Income Disregard for Certain Children. Disregard child support payments received, and social security payments received under Title II   | SSI has no similar disregard. | Optional categorically needy disabled children under 18. §§1902(a)(10)(A)(ii)(X), 1902(e), 1902(m) 1905(a)(i).  Medically needy disabled children under 18. §§1902(a)(10)(C), 1902(e), 1905(a)(i).  Optional categorically needy children under age 21 who would be institutionalized but for HCB services; §§. 1902(a)(10)(A)(ii)(X), 1902(m), 1905(a)(i) and 1915(c)  Medically needy disabled children under age 21 who would be institutionalized but for HCB services; §§1902 (a)(10(C), 1905(a)(i), 1915(c).   |

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| TN No    | N/A   |

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AUGUST 1991

# HCFA-PM-91-4 (BPD) SUPPLEMENT 8b to ATTACHMENT 2.6-A

Page 2

### STATE PLAN UNDER TITLE XIX OF THE SOCIAL SECURITY ACT

| State: | MINNESOTA       |
|--------|-----------------|
| June.  | WILL TILL OUT I |

## MORE LIBERAL METHODS OF TREATING RESOURCES UNDER § 1902(r)(2) OF THE ACT

| POLICY   | HOW POLICY IS MORE LIBERAL  | GROUPS TO WHICH POLICY IS APPLIED   |
|--|---|---|
| Spouse Asset Exclusion: Do not count or deem assets of the ineligible spouse to the disabled person.   | SSI deems assets of the ineligible spouse to the disabled applicant or recipient.     | TWWIIA Basic Coverage Group.<br>§1902(a)(10)(A)(ii)(XV).  |
| Retirement/Medical Benefits Exclusion: In step two, Exclude the following assets of the employed disabled person: retirement accounts including individual accounts, 401(k) plans, 403(b) plans, Keogh plans, pension plans, and medical expense accounts through the employer.  | SSI has no similar exclusions.  | TWWIIA Basic Coverage Group.<br>§1902(a)(10)(A)(ii)(XV).  |
| Dual-eligible Property Exclusion. Disregard \$8,000 in nonexcluded assets for an individual, and \$15,000 for a couple.  | SSI allows \$2,000 in nonexcluded assets for an individual, and \$3,000 for a couple. | Qualified medicare beneficiaries. §1902(a)(10)(E)(i). Specified low-income medicare beneficiaries. §1902(a)(10)(E)(iii). Qualified Individuals. §1902(a)(10)(E)(iv).  |
| Transition Disregard for Disabled Individuals Who Were Working.  For individuals who become ineligible for the TWWIIA Basic Coverage Group under §1902(a)(10)(A)(ii)(XV) due to loss of earnings, and who qualify for Medicaid under another category, continue to disregard for 12 consecutive months the assets allowed and excluded under the TWWIIA Basic Coverage Group, §1902(a)(10)(A)(ii)(XV). | SSI has no similar disregard  | Mandatory categorically needy aged, blind and disabled using more restrictive criteria under §1902(f)  Optional categorically needy aged and disabled groups. §1902(a)(10)(A)(ii).  Medically needy aged, blind, and disabled. §1902(a)(10)(C)(i)(III).  Families under §1931  Medically needy -families and children. §§1902(a)(10)(C)(i)(III), 1905(a)(i) and 1905(a)(ii).  Optional categorically needy disabled children under 18. §§1902(a)(10)(A)(ii)(X), 1902(e), 1902(m) 1905(a)(i).  Medically needy disabled children under 18. §§1902(a)(10)(C), 1902(e), 1905(a)(i).  Optional categorically needy children under age 21 who would be institutionalized but for HCB services; §§1902(a)(10)(A)(ii)(X), 1902(m), 1905(a)(i) and 1915(c)  Medically needy disabled children under age 21 who would be institutionalized but for HCB services; §§1902(a)(10(C), 1905(a)(i), 1915(c). |

| TN No. <u>01-10</u> |               |   |
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